

iTPM

23.1.1 Update

Winter 2023 Update Release Notes



BFN Certified

February 2023
Revised March 15, 2023

New Features in iTPM 23.1.1

Deduction Management Management Enhancements

1. S-03799: **Support for multi-currency without custom support scripts**
2. S-03804: **Append the deduction's Other Reference code to the Statement Charge's memo** in the debit line and description
3. S-03607: Add "**Estimated Spend**" as another row in the Settlement form.
4. S-03811: **New Voiding Settlement?** and **Settlement Adjustment?** checkboxes in the settlement for reporting:

Promotion Planning

5. S-03598: **Update Lump sum using the UPDATE ESTIMATE button** for approved promotions.
6. S-03675: **New Banner: Promotion is in the KPI refresh queue.**
7. S-03695: **Automatically run Process Plan overnight** for promotions that need it.
8. S-03813: **New LIST VIEW of promotions with KPIs** similar to the Promotion Comparison Report. **iTPM -> Promotions -> List.**

Annual planning

9. S-03350: **New "Remove item from promotion?" checkbox** to remove the item from the draft promotion.
10. S-03701: **Calculate Plan Spend in real time when the plan is saved.**
11. S-03769: Add **iTPM -> Help -> Annual Planning User Guides** to the iTPM center tab menu.
12. S-03838: S-03814 **Populate REVENUE in the Monthly Base Forecast for data entry method = "Calculate REVENUE"**
13. S-03832: **Populate UNITS in the Monthly Base Forecast for data entry method = "Calculate UNITS"**
14. S-03274: **Calculate an estimated base volume** if there is an overlapping base forecast record for the item or item group, use it to.
15. S-03886: **New data entry method for the monthly base forecast, "Spread Revenue, calculate Units"**
16. S-03934 **New button on the Event Plan, "Process Event Plans Now"**

Applying Off -invoice

17. S-03717: **New button on the sales order: "Apply or ReApply Discounts"** to check the "Apply iTPM Discounts" checkbox.
18. S-03721 **New button on the sales order: "Apply OI Now"** so you don't have to wait for the script to run..
19. S-03743: **New allowance list view: iTPM -> Promotions -> Allowances by item**

Note: Go to Technical Release notes for 23.1.1 at www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to iTPM in 23.1.1

1. Support for multi-currency without custom support scripts

Benefits: No custom scripts are required after you update iTPM to 23.1.1
iTPM will manage each subsidiary in the currency of that subsidiary.

The screenshot displays the 'Subsidiaries' management page in iTPM. The page includes a navigation bar with 'Setup' and 'Commerce' tabs. Below the navigation, there are options for 'List', 'Search', 'Audit Trail', and 'Subsidiary Settings Manager'. A 'VIEW' dropdown is set to 'Subsidiary w/currency', and there are 'Edit View' and 'New Subsidiary' buttons. A 'FILTERS' section is visible above the table. The table has columns for 'EDIT | VIEW', 'INTERNAL ID', 'NAME ▲', 'ELIMINATION', and 'CURRENCY'. The table contains seven rows of subsidiary data. The last two rows show subsidiaries with different currencies: 'Test sub of Holdings' (USA) and 'Test Sub with Euro' (Euro). Two arrows point to the 'Euro' entry in the 'CURRENCY' column.

EDIT VIEW	INTERNAL ID	NAME ▲	ELIMINATION	CURRENCY
Edit View	3	CG Squared, Inc.	No	USA
Edit View	5	Honeycomb US-Cental	No	USA
Edit View	1	Honeycomb US-East	No	USA
Edit View	8	Sub of East Holdings Sub	No	USA
Edit View	6	Honeycomb US-West	No	USA
Edit View	4	Test sub of Holdings	No	USA
Edit View	9	Test Sub with Euro	No	Euro

Subsidiaries with different currencies

2. Other Reference code is auto-appended to the Statement Charge's description

- iTPM Deductions Default: Results

[Return To Criteria](#)

+ FILTERS

EDIT

INTERNAL ID	STATUS	DATE	DOCUMENT NUMBER	ITPM CUSTOMER	REFERENCE CODE	TRANSACTION	REFERENCE DATE
18568	Open	08/24/2022	481	KeHE Distributors LLC	78912345	CustCred-MEM00000097	01/15/2022

Benefits: The customer will see their own reference # in the statement charge description.

Statement Charge KeHE Distributors LLC OPEN

[Edit](#) [Back](#) [Actions](#)

TRANSACTION NUMBER STM00000018	REF NO. STM00000018	TOTAL 500.00
A/R ACCOUNT 1100 Accounts Receivable	DUE DATE 01/14/2023	DEPARTMENT
CUSTOMER KeHE Distributors LLC	ITEM Statement charge item	SUBSIDIARY Honeycomb Mfg.
CURRENCY USA	QUANTITY 1	LOCATION 02: Boston
EXCHANGE RATE 1.00	DESCRIPTION Statement Charge for - iTPM Deduction #481: 78912345	CLASS
DATE 01/14/2023	RATE 500.00	ITPM APPLIED TO - iTPM Deduction #481
POSTING PERIOD Jan 2023		

ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	SUBSIDIARY	DEPARTMENT	CLASS	LOCATION
1100 Accounts Receivable	\$500.00		Yes	Statement Charge for - iTPM Deduction #481: 78912345	KeHE Distributors LLC	Honeycomb Holdings Inc. : Honeycomb Mfg.			02: Boston
6023 Trade Promotion : Open Deduction		\$500.00	Yes		KeHE Distributors LLC	Honeycomb Holdings Inc. : Honeycomb Mfg.			02: Boston

3. "Estimated Spend" is a row in the Settlement form

Benefits: Save time and mouse clicks with the Estimated Spend KPI right in the settlement form.

- iTPM Settlement 🔍
List Search More

Save Cancel

Drop files here. Click for more options.

Primary Information

ENTRY NO. To Be Generated	ITPM CUSTOMER Kroger Corporate	ITPM APPLIED TO - iTPM Deduction #401	<input type="checkbox"/> VOIDING SETTLEMENT
ITPM OTHER REFERENCE CODE	DATE * 01/14/2023	DEDUCTION OPEN BALANCE * 3,000.00	<input type="checkbox"/> SETTLEMENT ADJUSTMENT
STATUS Processing	POSTING PERIOD Jan 2023	REASON CODE	

Classification

SUBSIDIARY Honeycomb Mfg.	DEPARTMENT	LOCATION 01: San Francisco
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Promotion Detail

ITPM PROMOTION Jan scan Any Brand A item	PROMOTION DESCRIPTION \$2.00 / each scan in Columbus KMA In-store signage \$1,000	SHIP START DATE 01/15/2022
PROMOTION NUMBER 119		SHIP END DATE 01/21/2022

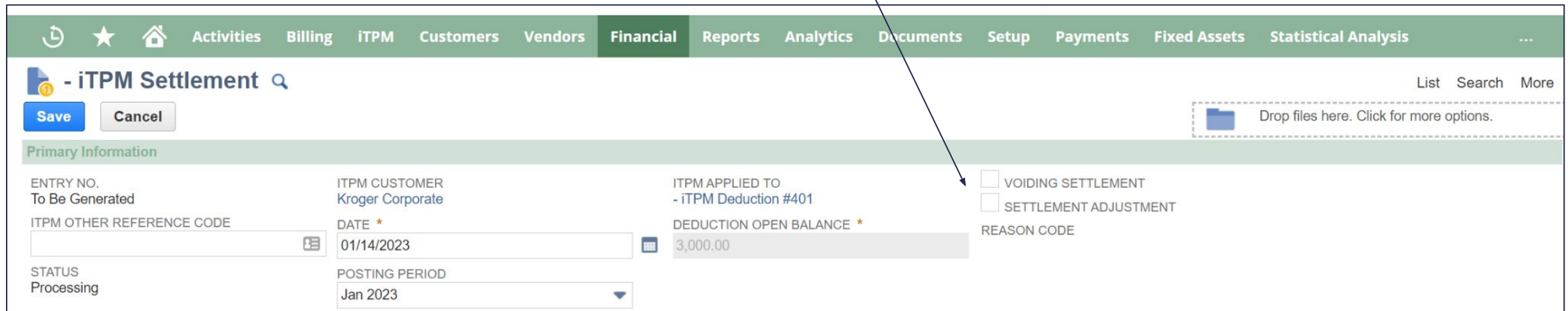
Transaction Detail

ESTIMATED SPEND 9,000.00	ESTIMATED SPEND: LUMP SUM 1,000.00	ESTIMATED SPEND: BILL-BACK 8,000.00	ESTIMATED SPEND: OFF-INVOICE 0.00	CREDIT
NET LIABILITY 8,100.00	NET LIABILITY : LUMP SUM 100.00	NET LIABILITY : BILL-BACK 8,000.00	NET LIABILITY : OFF-INVOICE 0.00	DEBIT
ITPM AMOUNT *	SETTLEMENT : LUMP SUM 0.00	SETTLEMENT : BILL-BACK 0.00	SETTLEMENT : MISSED OFF-INVOICE 0.00	OUT OF BALANCE BY
MEMO	UNDER (OVER) PAID : LUMP SUM 0.00	UNDER (OVER) PAID : BILL-BACK 0.00	UNDER (OVER) PAID : MISSED OFF-INVOICE 0.00	
	REQUESTED AMOUNT : LS	REQUESTED AMOUNT : BB	REQUESTED AMOUNT : OI	

4. New *Voiding Settlement* and *Settlement Adjustment* checkboxes

Benefits: Use these checkboxes to filter and identify *Voiding Settlements* and *Settlement Adjustments* for settlements created after updating to iTPM 23.1.1.

These are auto-populated when creating new settlements.



The screenshot displays the 'iTPM Settlement' form interface. The top navigation bar includes 'Financial', 'Reports', 'Analytics', 'Documents', 'Setup', 'Payments', 'Fixed Assets', and 'Statistical Analysis'. The form title is '- iTPM Settlement' with a search icon and 'List Search More' options. Below the title are 'Save' and 'Cancel' buttons. A file upload area is present with the text 'Drop files here. Click for more options.' The 'Primary Information' section contains the following fields:

ENTRY NO. To Be Generated	ITPM CUSTOMER Kroger Corporate	ITPM APPLIED TO - iTPM Deduction #401	<input type="checkbox"/> VOIDING SETTLEMENT
ITPM OTHER REFERENCE CODE	DATE * 01/14/2023	DEDUCTION OPEN BALANCE * 3,000.00	<input type="checkbox"/> SETTLEMENT ADJUSTMENT
STATUS Processing	POSTING PERIOD Jan 2023	REASON CODE	

An arrow points from the text 'These are auto-populated when creating new settlements.' to the checkboxes for 'VOIDING SETTLEMENT' and 'SETTLEMENT ADJUSTMENT'.

Option: Use a CSV upload to populate these checkboxes in settlements created before updating to iTPM 23.1.1.

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3. S-03607: Add "*Estimated Spend*" as another row in the Settlement form.
4. S-03811: **New *Voiding Settlement?* and *Settlement Adjustment?* checkboxes** in the settlement for reporting:

Promotion Planning

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Applying Off -invoice

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5. Update Lump sum using the UPDATE ESTIMATE button

- iTPM Promotion ← → List Search

Run again in Jan 2023

Promotion Information

SUBSIDIARY Honeycomb Holdings Inc. : Honeycomb Mfg.	PROMOTION TYPE MCB (scan/indirects)	CUSTOMER Publix	STATUS Approved	CONDITION Active
CURRENCY USA	TITLE / REFERENCE CODE Run again in Jan 2023	PRICE LEVEL List Price		
	PROMOTION # 679	DESCRIPTION \$2.00 off any brand C item In-store media ad		
	OTHER REFERENCE CODE	PLAN#		

Benefits: iTPM admin permission to EDIT approved promotions is no longer required to change the lump-sum for approved promotions.

You can add this permission to roles where you want users to true-up estimated spending in approved promotions.

Update Estimated Quantity More

PROMOTION #
Run again in Jan 2023

CUSTOMER
Publix

CHECK THIS BOX TO UPDATE LUMP SUMP

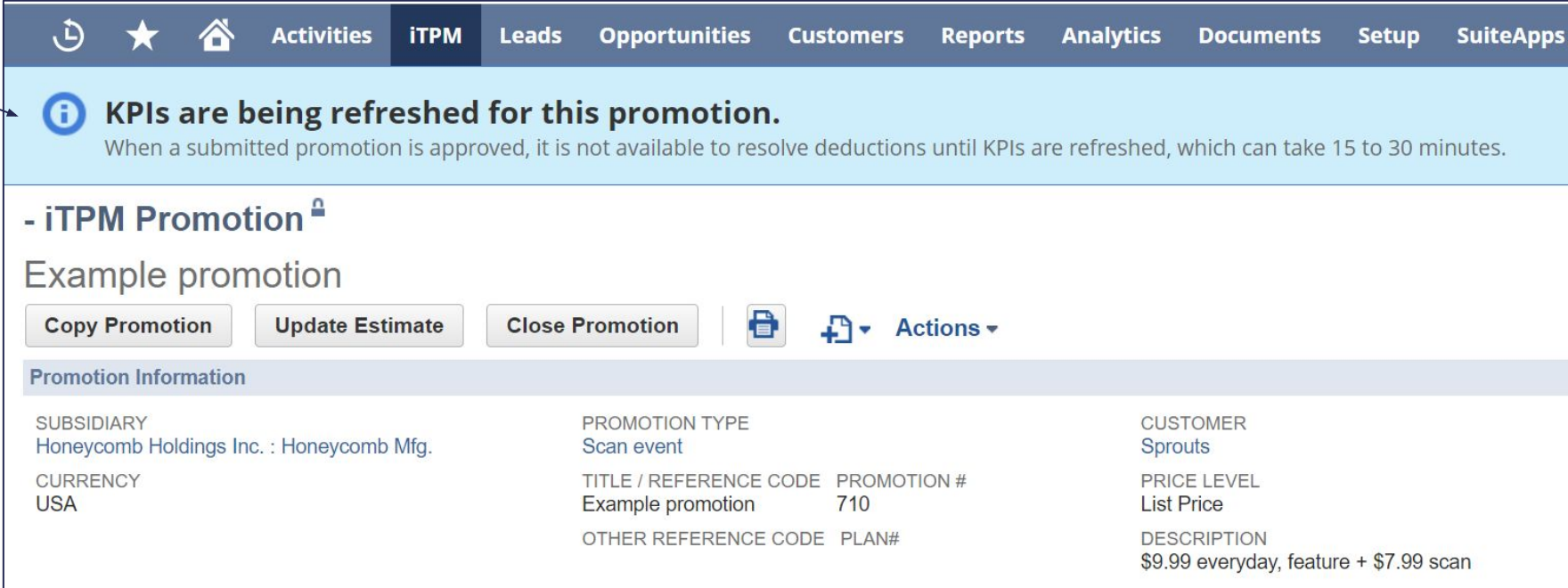
LS AMOUNT
1,500.00

Planning records •

UPDATE	PLANNING ID	ITEM	UNIT	MOP	%	▲ RATE	BASE	INCREMENTAL	%LIFT	REVENUE
<input type="checkbox"/>	iTPM_PP0292	-Brand C (7 items)	Each(12)	Bill-Back		2.00	550	400		

6. New Banner: 'Promotion is in the KPI refresh queue'

Benefits: No need to look for a missing KPI Refresh button to know that KPIs are being refreshed. The banner reminds you that KPIs are being refreshed.



The screenshot shows a software interface with a navigation bar at the top containing icons for home, star, and refresh, and menu items: Activities, iTPM, Leads, Opportunities, Customers, Reports, Analytics, Documents, Setup, and SuiteApps. A light blue banner at the top contains an information icon and the text: "KPIs are being refreshed for this promotion. When a submitted promotion is approved, it is not available to resolve deductions until KPIs are refreshed, which can take 15 to 30 minutes." Below the banner is a section titled "- iTPM Promotion" with a sub-header "Example promotion". This section includes buttons for "Copy Promotion", "Update Estimate", and "Close Promotion", along with a print icon and an "Actions" dropdown menu. A "Promotion Information" section follows, containing a table of details.

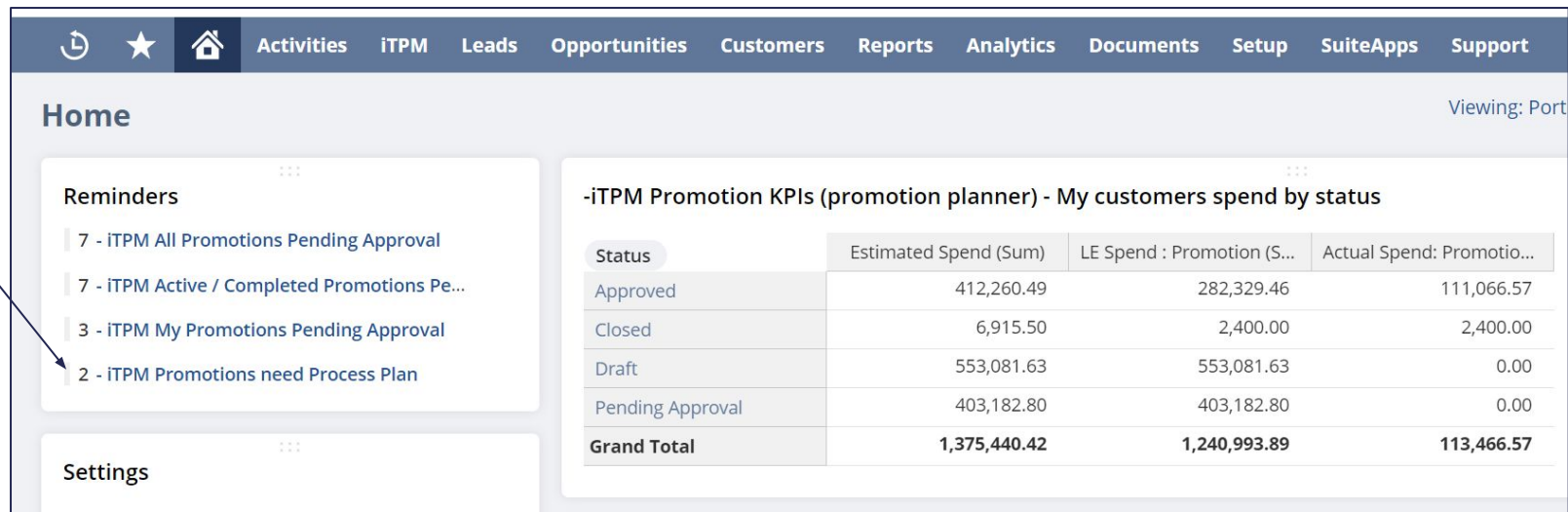
Promotion Information		
SUBSIDIARY Honeycomb Holdings Inc. : Honeycomb Mfg.	PROMOTION TYPE Scan event	CUSTOMER Sprouts
CURRENCY USA	TITLE / REFERENCE CODE Example promotion	PROMOTION # 710
	OTHER REFERENCE CODE PLAN#	PRICE LEVEL List Price
		DESCRIPTION \$9.99 everyday, feature + \$7.99 scan

7. *Process Plan* automatically runs overnight

Benefits: No waiting if you forget to click *Process Plan* after you create or edit your promotion. The promotion will automatically be ready tomorrow to submit for approval.

You can use a reminder to see what promotions need *Process Plan*.

If a promotion is in the queue more than one day, look for *Process Plan* processing notes to see if an error needs to be corrected.

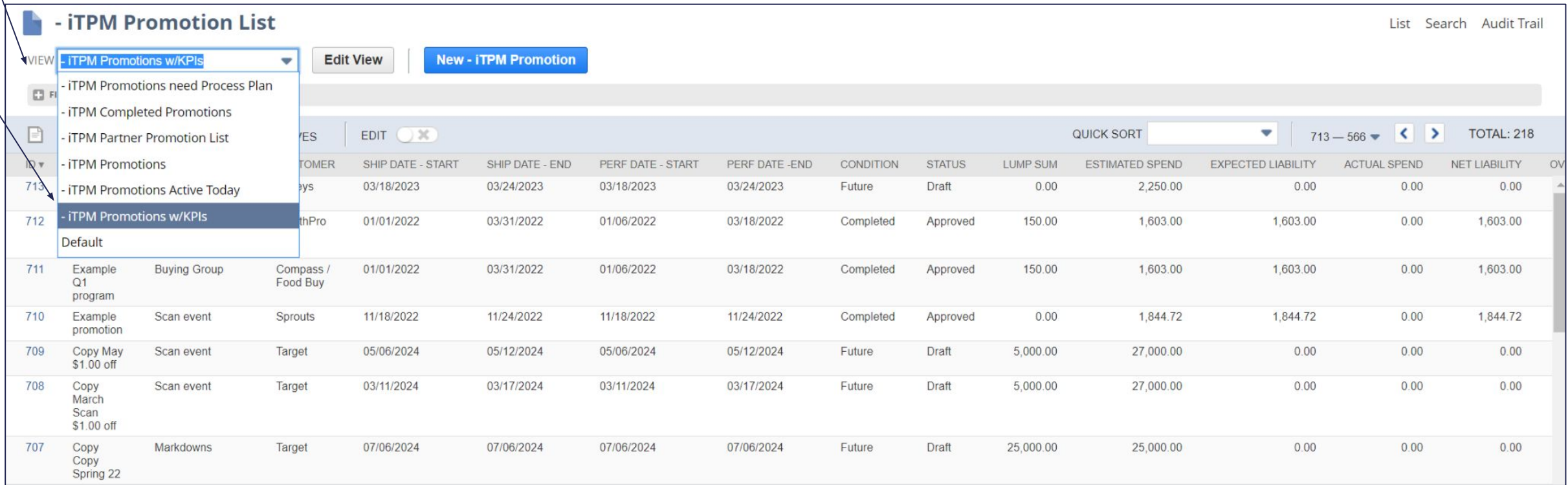


The screenshot shows the i-TPM software interface. The top navigation bar includes icons for home, star, and refresh, followed by menu items: Activities, iTPM, Leads, Opportunities, Customers, Reports, Analytics, Documents, Setup, SuiteApps, and Support. The main content area is titled 'Home' and includes a 'Viewing: Port' indicator. On the left, there is a 'Reminders' section with a list of items: '7 - iTPM All Promotions Pending Approval', '7 - iTPM Active / Completed Promotions Pe...', '3 - iTPM My Promotions Pending Approval', and '2 - iTPM Promotions need Process Plan'. An arrow points from the text on the left to the '2 - iTPM Promotions need Process Plan' item. Below the reminders is a 'Settings' section. On the right, there is a table titled '-iTPM Promotion KPIs (promotion planner) - My customers spend by status'. The table has four columns: Status, Estimated Spend (Sum), LE Spend : Promotion (S..., and Actual Spend: Promotio... The table data is as follows:

Status	Estimated Spend (Sum)	LE Spend : Promotion (S...	Actual Spend: Promotio...
Approved	412,260.49	282,329.46	111,066.57
Closed	6,915.50	2,400.00	2,400.00
Draft	553,081.63	553,081.63	0.00
Pending Approval	403,182.80	403,182.80	0.00
Grand Total	1,375,440.42	1,240,993.89	113,466.57

8. New LIST VIEW of promotions with KPIs

Benefits: Save mouse clicks having to go to the NetSuite global search to find this.
Now this is available directly from *iTPM -> Promotions -> List*



The screenshot displays the 'iTPM Promotion List' interface. At the top left, there is a dropdown menu for 'VIEW' with the following options: '- iTPM Promotions w/KPIs' (selected), '- iTPM Promotions need Process Plan', '- iTPM Completed Promotions', '- iTPM Partner Promotion List', '- iTPM Promotions', '- iTPM Promotions Active Today', '- iTPM Promotions w/KPIs', and 'Default'. To the right of the dropdown are buttons for 'Edit View' and 'New - iTPM Promotion'. The main area contains a table with columns: ID, CUSTOMER, SHIP DATE - START, SHIP DATE - END, PERF DATE - START, PERF DATE - END, CONDITION, STATUS, LUMP SUM, ESTIMATED SPEND, EXPECTED LIABILITY, ACTUAL SPEND, and NET LIABILITY. The table shows several rows of promotion data, including one for 'Example Q1 program' and another for 'Example promotion'. The interface also includes a 'QUICK SORT' dropdown, a page indicator '713 — 566', and a 'TOTAL: 218' label.

ID	CUSTOMER	SHIP DATE - START	SHIP DATE - END	PERF DATE - START	PERF DATE - END	CONDITION	STATUS	LUMP SUM	ESTIMATED SPEND	EXPECTED LIABILITY	ACTUAL SPEND	NET LIABILITY
713	Example promotion	03/18/2023	03/24/2023	03/18/2023	03/24/2023	Future	Draft	0.00	2,250.00	0.00	0.00	0.00
712	Example promotion	01/01/2022	03/31/2022	01/06/2022	03/18/2022	Completed	Approved	150.00	1,603.00	1,603.00	0.00	1,603.00
711	Example Q1 program	01/01/2022	03/31/2022	01/06/2022	03/18/2022	Completed	Approved	150.00	1,603.00	1,603.00	0.00	1,603.00
710	Example promotion	11/18/2022	11/24/2022	11/18/2022	11/24/2022	Completed	Approved	0.00	1,844.72	1,844.72	0.00	1,844.72
709	Copy May \$1.00 off	05/06/2024	05/12/2024	05/06/2024	05/12/2024	Future	Draft	5,000.00	27,000.00	0.00	0.00	0.00
708	Copy March Scan \$1.00 off	03/11/2024	03/17/2024	03/11/2024	03/17/2024	Future	Draft	5,000.00	27,000.00	0.00	0.00	0.00
707	Copy Copy Spring 22	07/06/2024	07/06/2024	07/06/2024	07/06/2024	Future	Draft	25,000.00	25,000.00	0.00	0.00	0.00

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9. New "**Remove item from promotion?**" checkbox (Also option to delete the promotion)

Benefits: Easily remove a planned item from your draft promotion with this checkbox.

The planning record in the promotion associated with your plan will be removed the next time the Plan to Promotion script runs.

- iTPM Plan

Example promotion in August

[Edit](#) [Back](#) | [Actions](#) ▾

Plan Information

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	CUSTOMER Aldi	PROMOTION TYPE / TEMPLATE MCB (direct accounts)	TITLE / REFERENCE CODE Example promotion in August	PROMOTION OWNER Alex Ring
PLAN # PROM # PLANNING # 3626 38388	PRICE LEVEL List Price	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	<input checked="" type="checkbox"/> REMOVE ITEM FROM PROMOTION?
PROCESSING STATUS	CURRENCY USA	<input type="checkbox"/> GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION 'Remove item' removes this plan item from the promotion if you also check "Validate data" or "Create or Update promotion"	<input type="checkbox"/> DELETE PROMOTION?
PROCESSING NOTES	<input checked="" type="checkbox"/> VALIDATE DATA?	<input type="checkbox"/> RUN PROCESS PLAN?		<input type="checkbox"/> IGNORE?
	<input type="checkbox"/> CREATE OR UPDATE PROMOTION?			<input type="checkbox"/> THIS IS A DUPLICATE
				<input type="checkbox"/> FLAG DUPLICATES IGNORE?

Plan Dates

YEAR 2,022	PERIOD START August	SHIP DATE START 08/01/2022	ORDER DATE START	PERFORMANCE START
	WEEKS PERFORMANCE	SHIP DATE END 08/31/2022	ORDER DATE END	PERFORMANCE END

Discounts and Lump sum (Enter either % discount -OR- rate per unit)

ITEM ACC00009	ITEM DISPLAY NAME Panasonic 5512D Phone	ITEM PRICE 375.99	% DISCOUNT 10.0%	% REDEMPTION 100.0%
UNIT OF MEASURE Each	LUMP SUM 0.00	METHOD OF PAYMENT Bill-Back	RATE	<input type="checkbox"/> MORE DISCOUNTS?
				<input type="checkbox"/> ALL ITEMS GET DISCOUNT?

10. Calculate Plan Total Spend in real time when the plan is saved.

Benefits: Real-time feedback on the cost of your planned event after you save or create your plan.

Plan Total Spend =
Lump Sum + Bill-back + off-invoice

Bill-back = Total Units times the allowance rate
.. Or...

Bill-back = Total Revenue times the % discount

(Off-invoice calculation is similar to Bill-Back)

854778965

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Plan Information

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	CUSTOMER Aldi	PROMOTION TYPE / TEMPLATE MCB (direct accounts)	TITLE / REFERENCE CODE 854778965	PROMOTION OWNER Alex Ring
PLAN # PROM # PLANNING # 650 24419	PRICE LEVEL List Price	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	<input type="checkbox"/> REMOVE ITEM FROM PROMOTION?
PROCESSING STATUS	CURRENCY	<input checked="" type="checkbox"/> GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION	<input type="checkbox"/> DELETE PROMOTION?
PROCESSING NOTES		<input type="checkbox"/> VALIDATE DATA?		<input type="checkbox"/> IGNORE?
		<input type="checkbox"/> RUN PROCESS PLAN?		<input type="checkbox"/> THIS IS A DUPLICATE
		<input type="checkbox"/> CREATE OR UPDATE PROMOTION?		<input type="checkbox"/> FLAG DUPLICATES IGNORE?

Plan Dates

YEAR 2,022	PERIOD START April	SHIP DATE START 04/01/2022	ORDER DATE START 04/01/2022	PERFORMANCE START 04/01/2022
	WEEKS PERFORMANCE	SHIP DATE END 04/30/2022	ORDER DATE END 04/30/2022	PERFORMANCE END 04/30/2022

Discounts and Lump sum (Enter either % discount -OR- rate per unit)

ITEM ACC00004	ITEM DISPLAY NAME Merlin 4412D+ Phone	ITEM PRICE	% DISCOUNT	% REDEMPTION 100.0%
UNIT OF MEASURE Each	LUMP SUM 200.00	METHOD OF PAYMENT Bill-Back	RATE 2.00	<input type="checkbox"/> MORE DISCOUNTS?
				<input type="checkbox"/> ALL ITEMS GET DISCOUNT?

Estimated Quantity (Enter any two: Base & % lift, -OR- Revenue and % lift, -OR- base and incremental)

BASE 50	INCREMENTAL 0	% LIFT 0.0%	REVENUE 0.00	<input type="checkbox"/> UPDATE BASE WITH FORECAST
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Retail Info (Optional)

EVERDAY PRICE	MERCH PRICE	% ACV	ACTIVITY
---------------	-------------	-------	----------

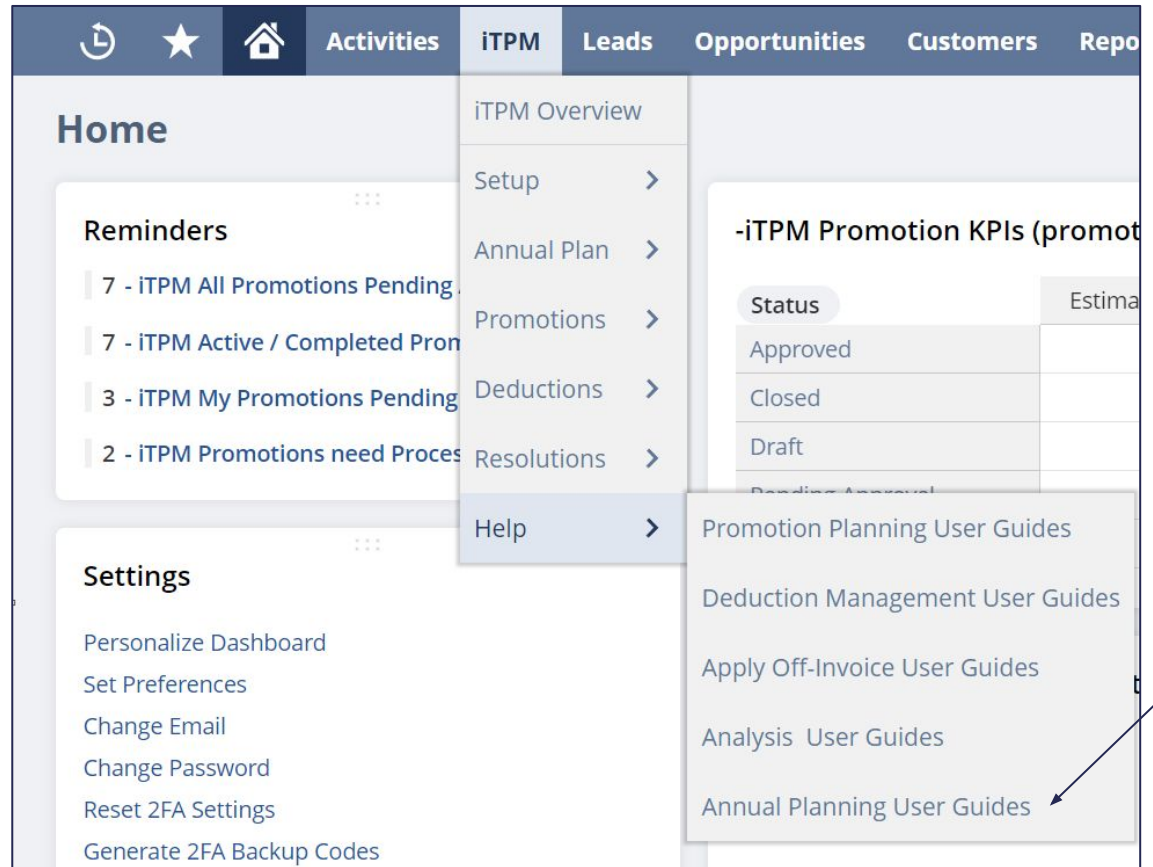
KPIs and Calculated Measures

CALCULATED BASE 50	TOTAL EVENT UNITS 50	INC EVENT REVENUE 0.00	PLAN TOTAL SPEND 300.00
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11. Add *iTPM* -> *Help* -> *Annual Planning User Guides*

Benefits: Faster access to online user guides and training videos for annual planning.

Less confusion for promotion planners that don't use annual planning features because planning resources are separate under *iTPM* -> *Help* -> ***Promotion Planning User Guides***



12. Monthly Base Forecast for data entry method = "Calculate REVENUE"

Benefits: Less time on data entry. Enter **units**, let *i*TPM use price to calculate base revenue for you.

If you didn't enter a price for each month, *i*TPM uses the price you enter for the year.

If you didn't enter a price for the year, *i*TPM will use the item or item group's current price.

- iTPM Monthly Base forecast

[Edit](#) | [Back](#) | | | [Actions](#)

BASE FORECAST

YEAR 2,022	CUSTOMER Aldi	UNIT OF MEASURE Each	DATA ENTRY METHOD Calculate Revenue	ID 26
SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	ITEM ACC00002	SOURCE Spins	<input type="checkbox"/> INCLUDE IN ROLL-UP TOTALS?	<input type="checkbox"/> INACTIVE
			<input type="checkbox"/> DON'T USE THIS TO CALCULATE BASE	

UNITS ← **1. Enter UNITS by MONTH**

01: UNITS 20	04: UNITS 20	07: UNITS 20	10: UNITS 20	UNITS TOTAL 240
02: UNITS 20	05: UNITS 20	08: UNITS 20	11: UNITS 20	
03: UNITS 20	06: UNITS 20	09: UNITS 20	12: UNITS 20	

REVENUE ← **2. *i*TPM calculates REVENUE by MONTH**

01: REV 2,000.00	04: REV 2,000.00	07: REV 2,000.00	10: REV 2,000.00	REV-TOTAL
02: REV 2,000.00	05: REV 2,000.00	08: REV 2,000.00	11: REV 2,000.00	
03: REV 2,000.00	06: REV 2,000.00	09: REV 2,000.00	12: REV 2,000.00	

PRICE

01: PRICE	04: PRICE	07: PRICE	10: PRICE	CURRENT ITEM PRICE 100.00
02: PRICE	05: PRICE	08: PRICE	11: PRICE	
03: PRICE	06: PRICE	09: PRICE	12: PRICE	

13. Monthly Base Forecast for data entry method = "Calculate UNITS"

Benefits: Less time on data entry. Enter revenue, let iTPM use price to calculate base units for you.

If you didn't enter a price for each month, iTPM uses the price you enter for the year.

If you didn't enter a price for the year, iTPM will use the item or item group's current price.

- iTPM Monthly Base forecast

Edit
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Actions

BASE FORECAST

YEAR 2,022	CUSTOMER Albertsons / Safeway	UNIT OF MEASURE Case(12b/48e)	DATA ENTRY METHOD Calculate Units	ID 3
SUBSIDIARY	ITEM ACC&BIC Group (20 Items)	SOURCE	<input type="checkbox"/> INCLUDE IN ROLL-UP TOTALS? <input type="checkbox"/> DON'T USE THIS TO CALCULATE BASE	<input type="checkbox"/> INACTIVE

UNITS ← **2. iTPM calculates UNITS by MONTH**

01: UNITS 1,000	04: UNITS 1,000	07: UNITS 1,000	10: UNITS 1,000	UNITS TOTAL
02: UNITS 1,000	05: UNITS 1,000	08: UNITS 1,000	11: UNITS 1,000	
03: UNITS 1,000	06: UNITS 1,000	09: UNITS 1,000	12: UNITS 1,000	

REVENUE ← **1. Enter REVENUE by MONTH**

01: REV 17,950.00	04: REV 17,950.00	07: REV 17,950.00	10: REV 17,950.00	REV-TOTAL
02: REV 17,950.00	05: REV 17,950.00	08: REV 17,950.00	11: REV 17,950.00	
03: REV 17,950.00	06: REV 17,950.00	09: REV 17,950.00	12: REV 17,950.00	

PRICE

01: PRICE	04: PRICE	07: PRICE	10: PRICE	CURRENT ITEM PRICE 17.95
02: PRICE	05: PRICE	08: PRICE	11: PRICE	
03: PRICE	06: PRICE	09: PRICE	12: PRICE	

14. Calculate an estimated base volume

Benefits: Save time if you want to use your monthly forecasted base in event plans.

If there is a monthly base forecast for your customer, item or item group, and promotion dates, iTPM uses the plan's shipment dates to calculate a base that is proportional to the base in the overlapping months.

If the base is in a different unit-of-measure, iTPM converts the calculated base into the plan's unit-of-measure.

You have the option to use this calculated base in your Event plan.

Example calculated base

[Edit](#) [Back](#) [Print](#) [Refresh](#) [Actions](#)

Plan Information				
SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	CUSTOMER Aldi	PROMOTION TYPE / TEMPLATE MCB (direct accounts)	TITLE / REFERENCE CODE Example calculated base	PROMOTION OWNER Alex Ring
PLAN # PROM # PLANNING # 3767 41255 2740	PRICE LEVEL 10% Discount Level	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	<input type="checkbox"/> REMOVE ITEM FROM PROMOTION?
PROCESSING STATUS	CURRENCY USA	<input checked="" type="checkbox"/> GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION Calculated base uses monthly base forecast	<input type="checkbox"/> DELETE PROMOTION?
PROCESSING NOTES		<input type="checkbox"/> VALIDATE DATA?		<input type="checkbox"/> IGNORE?
		<input type="checkbox"/> RUN PROCESS PLAN?		<input type="checkbox"/> THIS IS A DUPLICATE
		<input type="checkbox"/> CREATE OR UPDATE PROMOTION?		<input type="checkbox"/> FLAG DUPLICATES IGNORE?

Plan Dates				
YEAR 2,022	PERIOD START March	SHIP DATE START 04/01/2022	ORDER DATE START 04/01/2022	PERFORMANCE START 04/01/2022
	WEEKS PERFORMANCE	SHIP DATE END 05/31/2022	ORDER DATE END 05/31/2022	PERFORMANCE END 04/30/2022

Discounts and Lump sum (Enter either % discount -OR- rate per unit)				
ITEM ACC00002	ITEM DISPLAY NAME Merlin 4400 Phone	ITEM PRICE 90.00	% DISCOUNT 10.0%	% REDEMPTION 100.0%
UNIT OF MEASURE Each	LUMP SUM 200.00	METHOD OF PAYMENT Bill-Back	RATE	<input type="checkbox"/> MORE DISCOUNTS?
				<input type="checkbox"/> ALL ITEMS GET DISCOUNT?

Estimated Quantity (Enter any two: Base & % lift, -OR- Revenue and % lift, -OR- base and incremental)				
BASE 40	INCREMENTAL 20	% LIFT	REVENUE	<input checked="" type="checkbox"/> UPDATE BASE WITH FORECAST

Retail Info (Optional)			
EVERDAY PRICE	MERCH PRICE	% ACV	ACTIVITY TPR : Shelf Talker

KPIs and Calculated Measures			
CALCULATED BASE 40	TOTAL EVENT UNITS 60	INC EVENT REVENUE 0.00	PLAN TOTAL SPEND 740.00

15. New Monthly base forecast data entry method: **"Spread Revenue, calculate Units"**

Benefits: Less time on data entry. Enter annual revenue, let iTPM spread it across months and calculate units.

If you didn't enter a price for each month, iTPM uses the price you enter for the year.

If you didn't enter a price for the year, iTPM will use the item or item group's current price.

- iTPM Monthly Base forecast				
<div style="display: flex; justify-content: space-between; align-items: center;"> Edit Back Print Actions </div>				
BASE FORECAST				
YEAR 2,022	CUSTOMER KeHE	UNIT OF MEASURE Each	DATA ENTRY METHOD Spread Revenue Calculate Units	ID 23
SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	ITEM ACC00002	SOURCE	<input type="checkbox"/> INCLUDE IN ROLL-UP TOTALS?	<input type="checkbox"/> INACTIVE
			<input type="checkbox"/> DON'T USE THIS TO CALCULATE BASE	
UNITS				
← 2. iTPM spreads UNITS across all MONTHS				
01: UNITS 200	04: UNITS 200	07: UNITS 200	10: UNITS 200	UNITS TOTAL 1,200
02: UNITS 200	05: UNITS 200	08: UNITS 200	11: UNITS 200	
03: UNITS 200	06: UNITS 200	09: UNITS 200	12: UNITS 200	
REVENUE				
← 3. iTPM calculates UNITS by MONTHS				
01: REV 20,000.00	04: REV 20,000.00	07: REV 20,000.00	10: REV 20,000.00	REV-TOTAL 240,000.00
02: REV 20,000.00	05: REV 20,000.00	08: REV 20,000.00	11: REV 20,000.00	
03: REV 20,000.00	06: REV 20,000.00	09: REV 20,000.00	12: REV 20,000.00	
PRICE				
01: PRICE	04: PRICE	07: PRICE	10: PRICE	CURRENT ITEM PRICE 100.00
02: PRICE	05: PRICE	08: PRICE	11: PRICE	
03: PRICE	06: PRICE	09: PRICE	12: PRICE	

16. New button on the Event Plan: **"Process Event Plan Now"**

Benefits: Save time so you don't have to wait for the script to process your Event Plans.

If you don't want to wait for the Plan-to-Promotion script to run, you can click the **"Process Event Plans Now"** button.

If you don't see the button, then you know the script is currently running.

Note: If nothing happens, your role does not have the needed permissions to trigger the script.

The screenshot shows the iTPM Plan interface for 'Example May bill-back'. The 'Process Event Plans Now' button is highlighted with a blue arrow. The interface includes several sections: Plan Information, Plan Dates, Discounts and Lump sum, Estimated Quantity, and KPIs and Calculated Measures.

Plan Information				
SUBSIDIARY Honeycomb Holdings Inc. : Honeycomb Mfg.		CUSTOMER Sobeys	PROMOTION TYPE / TEMPLATE MCBs	TITLE / REFERENCE CODE Example May bill-back
EVENT PLAN # 307	PROMOTION # 579	PLANNING # 290	PRICE LEVEL 5% Discount Level	PROMOTION OWNER Alex Ring
PROCESSING STATUS		CURRENCY	PLAN APPROVAL STATUS	OTHER REFERENCE CODE 81607
PROCESSING NOTES			<input checked="" type="checkbox"/> GROUP PLANS WITH THIS TITLE? <input checked="" type="checkbox"/> VALIDATE DATA? <input type="checkbox"/> RUN PROCESS PLAN? <input checked="" type="checkbox"/> CREATE OR UPDATE PROMOTION?	<input type="checkbox"/> REMOVE ITEM FROM PROMOTION? <input type="checkbox"/> DELETE PROMOTION? <input type="checkbox"/> IGNORE? <input type="checkbox"/> THIS IS A DUPLICATE <input type="checkbox"/> FLAG DUPLICATES IGNORE? BROKER / OTHER NOTES
Plan Dates				
YEAR 2,022	PERIOD START May	SHIP DATE START 05/01/2022	ORDER DATE START 05/01/2022	PERFORMANCE START 05/01/2022
	WEEKS PERFORMANCE	SHIP DATE END 05/31/2022	ORDER DATE END 05/31/2022	PERFORMANCE END 05/31/2022
Discounts and Lump sum (Enter either % discount -OR- rate per unit)				
ITEM ACC00008 Product A size 8	ITEM DISPLAY NAME Product A size 8	ITEM PRICE 95.95	% DISCOUNT 10.0%	% REDEMPTION 100.0%
UNIT OF MEASURE Each(1)	LUMP SUM 0.00	METHOD OF PAYMENT Bill-Back	RATE 0.00	<input type="checkbox"/> MORE DISCOUNTS? <input type="checkbox"/> ALL ITEMS GET DISCOUNT?
Estimated Quantity (Enter any two: Base & % lift, -OR- Revenue and % lift, -OR- base and incremental)				
BASE 0	INCREMENTAL 0	% LIFT 0.0%	REVENUE 0.00	<input type="checkbox"/> UPDATE BASE WITH FORECAST
KPIs and Calculated Measures				
CALCULATED BASE	TOTAL EVENT UNITS	TOTAL EVENT REVENUE	INC EVENT REVENUE	PLAN TOTAL SPEND 0.00

New Features in iTPM 23.1.1

Deduction Management Management Enhancements

1. S-03799: **Support for multi-currency without custom support scripts**
2. S-03804: **Append the deduction's Other Reference code to the Statement Charge's memo** in the debit line and description
3. S-03607: Add "**Estimated Spend**" as another row in the Settlement form.
4. S-03811: **New Voiding Settlement?** and **Settlement Adjustment?** checkboxes in the settlement for reporting:

Promotion Planning

5. S-03598: **Update Lump sum using the UPDATE ESTIMATE button** for approved promotions.
6. S-03675: **New Banner: Promotion is in the KPI refresh queue.**
7. S-03695: **Automatically run Process Plan overnight** for promotions that need it.
8. S-03813: **New LIST VIEW of promotions with KPIs** similar to the Promotion Comparison Report. **iTPM -> Promotions -> List.**

Annual planning

9. S-03350: **New "Remove item from promotion?" checkbox** to remove the item from the draft promotion.
10. S-03701: **Calculate Plan Spend in real time when the plan is saved.**
11. S-03769: Add **iTPM -> Help -> Annual Planning User Guides** to the iTPM center tab menu.
12. S-03838: S-03814 **Populate REVENUE in the Monthly Base Forecast for data entry method = "Calculate REVENUE"**
13. S-03832: **Populate UNITS in the Monthly Base Forecast for data entry method = "Calculate UNITS"**
14. S-03274: **Calculate an estimated base volume** if there is an overlapping base forecast record for the item or item group, use it to.
15. S-03886: **New data entry method for the monthly base forecast, "Spread Revenue, calculate Units"**
16. S-03934 **New button on the Event Plan, "Process Event Plans Now"**

Applying Off -invoice

17. S-03717: **New button on the sales order: "Apply or ReApply Discounts"** to check the "Apply iTPM Discounts" checkbox.
18. S-03721 **New button on the sales order: "Apply OI Now"** so you don't have to wait for the script to run..
19. S-03743: **New allowance list view: iTPM -> Promotions -> Allowances by item**

Note: Go to Technical Release notes for 23.1.1 at www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to iTPM in 23.1.1

17. New button on the sales order: "Apply or ReApply Discounts"

Benefits: Save time and mouse clicks to check the "Apply iTPM Discounts" checkbox on sales orders.

If there are discounts to apply, your sales order will go into the queue to be processed and you'll see the "Please wait..." banner on the sales order.

If there are no discounts to apply, in real-time you'll get a pop-up confirmation and your sales order is ready for approval and/or fulfillment.

The screenshot shows a web application interface for managing sales orders. At the top, there is a navigation bar with tabs for Activities, Cases, Customers, Reports, Analytics, Documents, Setup, Status, iTPM, and Support. Below this, the main header displays 'Sales Order' with a search icon and navigation arrows. The specific order is identified as 'SLS00000720 Kroger Corporate : Kroger Columbus' with a status of 'PENDING FULFILLMENT'. A row of action buttons includes 'Edit', 'Back', 'Close Order', 'Apply or ReApply Discounts', and 'Process OI now'. A file upload area is also present with the text 'Drop files here. Click for more options.' The main content area is divided into two columns of metadata. The left column includes fields for CUSTOMER (Kroger Corporate : Kroger Columbus), ORDER # (SLS00000720), JOB, OPPORTUNITY, CURRENCY (USA), SALES REP (Anitha T Araza), SUBSIDIARY (Honeycomb Mfg.), PO # (example April 27), and TERMS (Net 30). The right column includes fields for DATE (10/20/2022), LOCATION (01: San Francisco), DEPARTMENT, PROMISE DATE (10/30/2022), EMAIL, and CONTACT(S). To the right of the metadata is a 'Summary' table:

Summary	
SUBTOTAL	963.85
DISCOUNT	
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	
TOTAL	963.85

At the bottom of the interface, there is a tabbed menu with 'Items', 'Promotions', 'Address', 'Shipping', 'Messages', 'History', 'iTPM', 'SuiteSocial', and 'iTPM_Discounts'. The 'iTPM' tab is active, showing a list of checkboxes for discount application:

- APPLY ITPM DISCOUNTS
- ITPM DISCOUNTS APPLIED
- REMOVE ITPM DISCOUNTS
- NO OVERLAPPING PROMOTIONS / OVERRIDE
- SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
- DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

18. New button on the sales order: "**Apply OI Now**" so you don't have to wait

Benefits: Less time waiting the 15 minutes in between when the off-invoice script runs.

If you don't see the "*Process OI now*" button, then the script is already running.

The screenshot shows a web application interface for managing sales orders. At the top, there is a navigation bar with tabs for Activities, Cases, Customers, Reports, Analytics, Documents, Setup, Status, iTPM, and Support. Below this is a light blue banner with an information icon and the text: "Please wait while REMOVING iTPM discounts... Please wait! iTPM is processing to remove all applied discounts of off-invoice and net-bill allowances for this Transaction. To prevent invoicing errors, wait to approve and/or fulfill this order until processing is completed. This process runs every 15 minutes." Below the banner is the main content area for a sales order. The order number is SLS00000720, and the customer is Kroger Corporate : Kroger Columbus. The status is "PENDING FULFILLMENT". There are several buttons: "Edit", "Back", "Close Order", "Apply or ReApply Discounts", and "Process OI now". The "Process OI now" button is highlighted with a grey box and a callout arrow pointing to it. Below the buttons is a form with fields for CUSTOMER, ORDER #, JOB, OPPORTUNITY, CURRENCY, SALES REP, SUBSIDIARY, PO #, and TERMS. To the right of the form is a "Summary" table with the following data:

Summary	
SUBTOTAL	963.85
DISCOUNT	
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	
TOTAL	963.85

At the bottom of the interface, there is a green bar with tabs for Items, Promotions, Address, Shipping, Messages, History, iTPM, SuiteSocial, and iTPM_Discounts. Below this bar are several checkboxes for iTPM settings:

- APPLY iTPM DISCOUNTS
- iTPM DISCOUNTS APPLIED
- REMOVE iTPM DISCOUNTS
- NO OVERLAPPING PROMOTIONS / OVERRIDE
- SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
- DO NOT APPLY/REMOVE iTPM DISCOUNTS ON THIS SALES ORDER

19. New allowance list view: *iTPM -> Promotions -> Allowances by item*

Benefits: For promotions planned using item groups, see your discounts by item across promotions. Same information as under the ALLOWANCES subtab in the promotion.

- iTPM Allowances Search items: Results List Search Audit Trail

[Return To Criteria](#)

FILTERS

CUSTOMER: ITEM: CONDITION: SHIP DATE - START: FROM: TO: SHIP DATE - END: FROM:

TO: STATUS: METHOD OF PAYMENT: ALLOWANCE TYPE: STYLE:

1 — 1324 TOTAL: 1867

CUSTOMER	ITPM PROMOTION	PROM#	STATUS	CONDITION	SHIP DATE - START	SHIP DATE - END	ITEM	ITEM DESCRIPTION	PRICE LEVEL	METHOD OF PAYMENT	ALLOWANCE TYPE	UNIT	UNIT PRICE	RATE PER UNIT	% PER UNIT
Kroger Corporate	Example bill-back promotion w/LS	1	Approved	Completed	01/01/2016	12/31/2018	CAR00004	Brand C size 4	List Price	Bill-Back	% Discount	Each(1)	79.99	12.00	15.0%
Kroger Corporate	Example bill-back promotion w/LS	1	Approved	Completed	01/01/2016	12/31/2018	CAR00005	Brand C size 5	List Price	Bill-Back	% Discount	Case(12)	599.76	89.96	15.0%
Kroger Corporate	Example bill-back promotion w/LS	1	Approved	Completed	01/01/2016	12/31/2018	CAR00007	Brand C size 7	List Price	Bill-Back	% Discount	Each(12)	24.99	3.75	15.0%
Kroger Corporate	Example bill-back promotion w/LS	1	Approved	Completed	01/01/2016	12/31/2018	- ERA00001	Brand E Size 10	List Price	Bill-Back	% Discount	Box(12e)	23.76	3.56	15.0%
Kroger Corporate	Example bill-back promotion w/LS	1	Approved	Completed	01/01/2016	12/31/2018	- PEN00001	Brand P Size 20	List Price	Bill-Back	% Discount	Case(12)	83.76	12.56	15.0%
Sobeys	Bill-back promotion w/LS	2	Approved	Completed	06/01/2018	06/15/2018	CAR00004	Brand C size 4	List Price	Bill-Back	% Discount	Each(1)	79.99	12.00	15.0%
Sobeys	Bill-back promotion w/LS	2	Approved	Completed	06/01/2018	06/15/2018	CAR00005	Brand C size 5	List Price	Bill-Back	% Discount	Case(12)	599.76	89.96	15.0%
Sobeys	Bill-back promotion w/LS	2	Approved	Completed	06/01/2018	06/15/2018	CAR00007	Brand C size 7	List Price	Bill-Back	% Discount	Each(12)	24.99	3.75	15.0%
Sobeys	Bill-back promotion w/LS	2	Approved	Completed	06/01/2018	06/15/2018	- ERA00001	Brand E Size 10	List Price	Bill-Back	% Discount	Box(12e)	23.76	3.56	15.0%
Sobeys	Bill-back promotion w/LS	2	Approved	Completed	06/01/2018	06/15/2018	- PEN00001	Brand P Size 20	List Price	Bill-Back	% Discount	Case(12)	83.76	12.56	15.0%
Kroger Corporate : Peyton	Free cases	3	Approved	Completed	01/01/2018	12/31/2018	BAG00001	Brand B flavor 1	List Price	Bill-Back	% Discount	Each(1)	150.00	150.00	100.0%

Update Schedule

The next update is tentatively scheduled for Summer **2023**.

iTPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 23.1.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release 23.2.1	Summer 2023. Release date and enhancements may change based on client needs and requests.

* Subject to change

Summary

- Email questions and issues to support@cgsquared.com
- Updated User Guides for all roles are available online at www.i-TPM.com/training-resources